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## ADMINISTRATIVE DRAFT REPORT

### CONFERENCE CENTER FEASIBILITY STUDY KING COUNTY INTERNATIONAL AIRPORT

Prepared for:

King County International Airport  
King County, Washington

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## I. INTRODUCTION AND SUMMARY

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### BACKGROUND

King County (County) is continuing the improvement of the King County International Airport (KCIA) and its related facilities serving airfreight, general aviation, and corporate clientele. However, currently some of the terminal facilities are underutilized and the County is investigating alternatives for this space that are compatible with the ongoing mission of the Airport, provide a benefit to the region, and are financially feasible. The present study evaluates the feasibility of a conference center.

King County and the entire Seattle Metropolitan Region have experienced robust growth and economic development during the past few years. As a part of this growth there has been a rapid increase in business travel and activity including conferences, trade shows, and other business gatherings. This report evaluates whether the demand for meeting and event space is being met by existing and planned facilities in King County, and whether conference facilities could be successful at KCIA.

The conclusions in this report are based upon a review of existing and proposed facilities, including interviews with facility operators. Meeting planners active in King County were contacted for additional information regarding meeting activity (see **Appendix C, List of Persons Contacted.**) Interviews were also conducted with King County firms to assess their level of demand and facility requirements, and a prior survey conducted by Airport staff was analyzed. Information was obtained from key conference industry sources on industry activity and financial characteristics. As described in the report, the conclusions depend upon a number of factors that cannot be predicted with certainty at this time, including the extent of required capital improvements, future market conditions, and successful implementation and operation of a new facility.

### CONCLUSIONS

**There is an estimated demand of approximately 8,000 meetings generated by businesses, associations, and non-profits in King County.** Substantial additional demand results from Seattle's growing position as an attractive destination for major regional and national meetings.

**Thirteen conference facilities and over 60 hotels with meeting space in King County are well utilized and are frequently unable to accommodate existing demand.** According to interviews with meeting planners and corporations, over 40 percent felt there is a lack of adequate facilities.

**A KCIA conference center potentially could capture up to 1,000 meetings per year.** In addition, it is likely that the facility could capture at least 100 social and other major events (auctions, etc.) per year. It is estimated that the primary source of demand will come from meetings and businesses in the KCIA area that do not require their meetings to be in close proximity to overnight accommodations. A KCIA center is assumed to capture half of the local demand; the other half either requires overnight accommodations or other facilities unavailable at KCIA, or is captured by competing facilities nearby; e.g., the Museum of Flight.

**KCIA's market share depends upon the level of facility upgrade and conference center operations.** The ability to capture demand assumes that adequate funds are invested to create a first-class, high quality facility, undertake a significant marketing program, and provide a broad range of conference and catering services. The facility would require sound proofing, unobstructed lines of sight in the larger rooms, state-of-the-art audio/visual equipment, and sufficient parking.

**A financial pro forma indicates that a KCIA conference center could cover its operating costs and generate \$ 250,000 per year, before taxes, depreciation and interest.** This level of activity, based on the market capture described above, would support debt service on improvement costs of approximately \$2 million.

**Significant expansion of the Museum of Flight could adversely affect KCIA's performance.** Detailed expansion plans are unavailable; however, if there is a significant expansion, it is likely that KCIA's market share would be reduced.

## **NEXT STEPS**

This market study indicates the potential to support a conference center. However, its success is highly contingent upon capital investments and successful management. Following are a series of recommended actions to further clarify the project's feasibility:

**Undertake design, architecture and engineering analysis to develop improvement cost estimates.** This work can help determine the required investments, risks, and financial feasibility.

**Evaluate alternative programs in light of potential capital investments.** For example, a limited improvement program utilizing a portion of the Arrivals Building could potentially accommodate anticipated demand but with lower capital costs. A more restricted program limited to the upgrade of Terminal Building rooms and the restaurant/lounge would accommodate smaller events and capture significantly less demand, but could prove to be a financially feasible alternative.

**Issue a Request for Letters of Interest by potential conference center operators.** After the capital costs and program alternatives have been clarified (and assuming the Airport still wishes to proceed), soliciting interest from potential operators would further define feasible options and their implications.

**Review the status of competitive facilities.** After completion of the prior steps, expansion plans and activity of competing facilities; i.e., the Museum of Flight and the new facilities planned in Tukwila should be reviewed.

## II. TRADE AREA DEMAND

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### MARKET SEGMENTS

The demand for meeting, special event, and conference space takes a variety of different forms and is generated by a range of sources. For the purpose of this analysis it is assumed that the demand for space at KCIA will originate from the following three sources, or market segments: 1) businesses and corporations, 2) trade associations and other non-profit organizations, and 3) social gatherings and other functions.

Each of the market segments cited above exhibit different attributes with regard to the kind of space they require, the frequency with which they require it, and the type of event typically held. Table II-1 provides an overview of the demand characteristics for each market segment. Further detail is provided below.

#### BUSINESS/CORPORATE GENERATED DEMAND

Private sector businesses generate the bulk of total demand for meeting space. Most of this demand is from larger companies, usually with more than 100 employees, that may have multiple branch offices located throughout the state or US. These companies use space for a variety of purposes, including board meetings, training seminars, product launchings, and other events. The large number high technology firms as well as national firms with local headquarters makes this market segment particularly active in the Seattle area.

Businesses rely extensively on hotels and conference centers for their meeting space requirements. This is because these facilities tend to provide a high level of business oriented services in an exclusive setting. These amenities include upscale furnishings, high-tech, audio-visual equipment, skilled planning staff, and catering. Other attributes important to businesses include available parking, convenient location, overnight accommodations, and privacy. In some cases businesses seek space that can accommodate special machinery, equipment, and loud noise. Factors such as a thematic setting and scenic views, although occasionally sought, tend to be less important for private companies.

#### ASSOCIATION/NON-PROFIT GENERATED DEMAND

Although trade associations and other non-profits organizations represent a small component of the total economy, they generate significant demand for meeting space. In contrast to business generated demand, association and non-profit oriented events tend to be more public in nature since they are designed to serve organization members and other affiliated individuals rather than in-house employees. Since attendees often pay rather than are paid to participate, facility amenities such as scenic views, thematic

**Table II - 1**  
**Overview of Meeting Space Market**  
**KCIA Conference Center Feasibility Study**

<b>Source of Demand</b>	<b>% of Total Meeting Space Demand (1)</b>	<b>Typical Events</b>	<b>Frequently Used Facilities (2)</b>
<b>Business/Corporate</b>	80%	Business Meetings Product Launches Training Seminars Retreats	Hotels Conference Facilities Convention Halls Resort Facilities
<b>Association/Non-Profit</b>	15%	Conventions Conferences Trade Shows Fundraiser Banquets/Luncheons	Convention Halls Conference Facilities Hotels
<b>Social/Community Groups</b>	5%	Ceremonies Festivals Parties/Reunions Auctions	Banquet Halls Community Center Restuarants/Bars Other (3)

(1) Estimate based on interviews with meeting planners and published reports. Does not include demand for restuarants, bars, community centers and other public or discount facilities.

(2) Illustrates primary facilities used by each market segment. Significant cross-over may exist between categories.

(3) Includes churches, school gymnasiums, boats, parks, and other public space or discount facilities.

Source: Reed Travel Group; Economic & Planning Systems, Inc.



settings, restaurant facilities, and overall presentation are often important considerations. In addition, surrounding entertainment, dining, and sightseeing opportunities can be advantageous. Nearby hotel accommodations and convenient commute opportunities are important for events that attract participants from outside the area.

Event size and type can vary significantly, ranging from large conventions and trade shows requiring exhibition halls and/or "breakout" rooms to smaller forums or workshops. Facilities that offer flexibility with regard to space, level of service, and pricing are often more successful at attracting this market segment given the wide range of events required.

### SOCIAL/COMMUNITY GENERATED DEMAND

Although social and community functions or events represent the smallest component of market demand, the segment is also the most diverse. Weddings, bar mitzvahs, or black-tie parties typically seek a thematic or upscale facility is required. In other cases, such as reunions, auctions, or festivals, the availability of space at a low cost is the key prerequisite. In most cases, evening and weekend demand time slots and holidays are in highest demand.

Since most demand is local, facilities generally need not be located near hotels or in the central business district to be successful. Facility requirements are also less stringent with regard to audio-visual and telecommunication equipment and privacy or soundproofing. Instead, facilities that offer flexibility with regard to catering, space usage, time slots, noise level, and acceptable activities tend to serve a broader market.

### EXISTING AND FUTURE DEMAND

This section focuses on the demand within King County for meeting and event space of the type relevant to the KCIA facility. As such it does not focus on national or international convention related business since this market is primarily served by the larger downtown facilities. In addition, although the KCIA facility will potentially attract users from throughout the County, this analysis divides the market area into four geographic submarkets based on their proximity to the facility. Because of the large number of competitive facilities in the area, it is assumed that KCIA will generate the largest portion of its demand from users who find the location relatively convenient.

### OVERVIEW OF THE REGIONAL ECONOMY

The demand for meeting space in a particular region is heavily dependent upon the size and composition of the local economy. Areas that serve as regional or national centers of trade and commerce, possess a diverse economic base, and contain a high proportion

of technology and export-oriented firms often exhibit higher demand for meeting or event space. In addition, areas with a significant number of large institutions and/or firms also tend require more meeting space.

Information on the size and composition of the King County economy is provided in **Table II-2**. As shown, the manufacturing, service, transportation and public utilities (TCU), and finance, insurance, and real estate (FIRE) sectors comprise approximately 65 percent of total employment. Because many of the firms in these sectors tend to be export oriented and/or regional in scope, they are likely to account for a disproportionate share of meeting demand. The two sectors that account for the bulk of the remaining employment, manufacturing and wholesale/retail trade typically generate less demand for meeting space.

**Table II-2** also provides information on the number of firms with over 100 employees. Although these firms account for only about 2 percent of the total establishments, they account for more than half of total employment. It is also important to note that these large companies are likely to generate a disproportionate share of total demand for meeting facilities since smaller firms typically do not have an ongoing demand for such space.

### **Market Area Geography**

As mentioned earlier, the geographic distribution of firms within King County will have important implications on demand for a KCIA facility. For the purposes of this analysis, EPS has divided King County into four separate quadrants, as shown in **Figure II-1**. These quadrants correspond to important geographical submarkets in terms of both the demand and supply of meeting space. Currently, the KCIA submarket is linked to both downtown Seattle and South King County, areas which possess separate and distinct meeting space supply, as described further in **Chapter III**.

Information on the distribution of employment by geographic submarket is provided in **Table II-3**. As shown, The KCIA submarket constitutes about 21 percent of total employment. The Seattle submarket has the largest employment concentration, followed by East County and South County respectively. Employment in the KCIA submarket is projected to grow at an annual rate about 1.5 percent from 1997 to 2010, compared to 1.6 percent for the County as a whole.

A further breakdown of the economic composition of the KCIA submarket is provided in **Table II-4**. As shown, overall the area is projected to gain about 45,000 new jobs. The bulk of this increase, or approximately 33 percent, is projected to come from the service sector. The manufacturing sector, currently the largest employer in the submarket, is actually projected to lose about 5,000 jobs during the period. However, both sectors combined will remain the largest component of total employment in the submarket during the period. This is important since these sectors typically account for a disproportionate share of meeting space demand.

**Table II - 2**  
**King County Employment and Firm Count by Sector: 1995**  
**KCIA Conference Center Feasibility Study**

Industry Sector	Employment	% Of Total	Total # of Establishments	Establishments > 100 Employees		
				Total	% of Firms	% of Employment By Sector
Ag., Forestry, & Mining	7,662	1%	1,168	8	1%	15%
Construction	48,507	6%	5,401	63	1%	29%
Manufacturing	147,484	17%	3,280	218	7%	77%
TPU (1)	66,391	8%	2,177	102	5%	68%
Wholesale/Retail Trade	230,602	27%	16,469	306	2%	37%
FIRE (2)	65,987	8%	6,050	91	2%	44%
Services	275,670	32%	19,531	446	2%	51%
Non-Profits & Associations (3)	19,832	2%	1,797	22	1%	37%
Other	811	0%	648	1	0%	22%
Total (4)	862,946	100%	56,521	1,257	2%	51%

(1) Includes Transportation and Public Utilities.

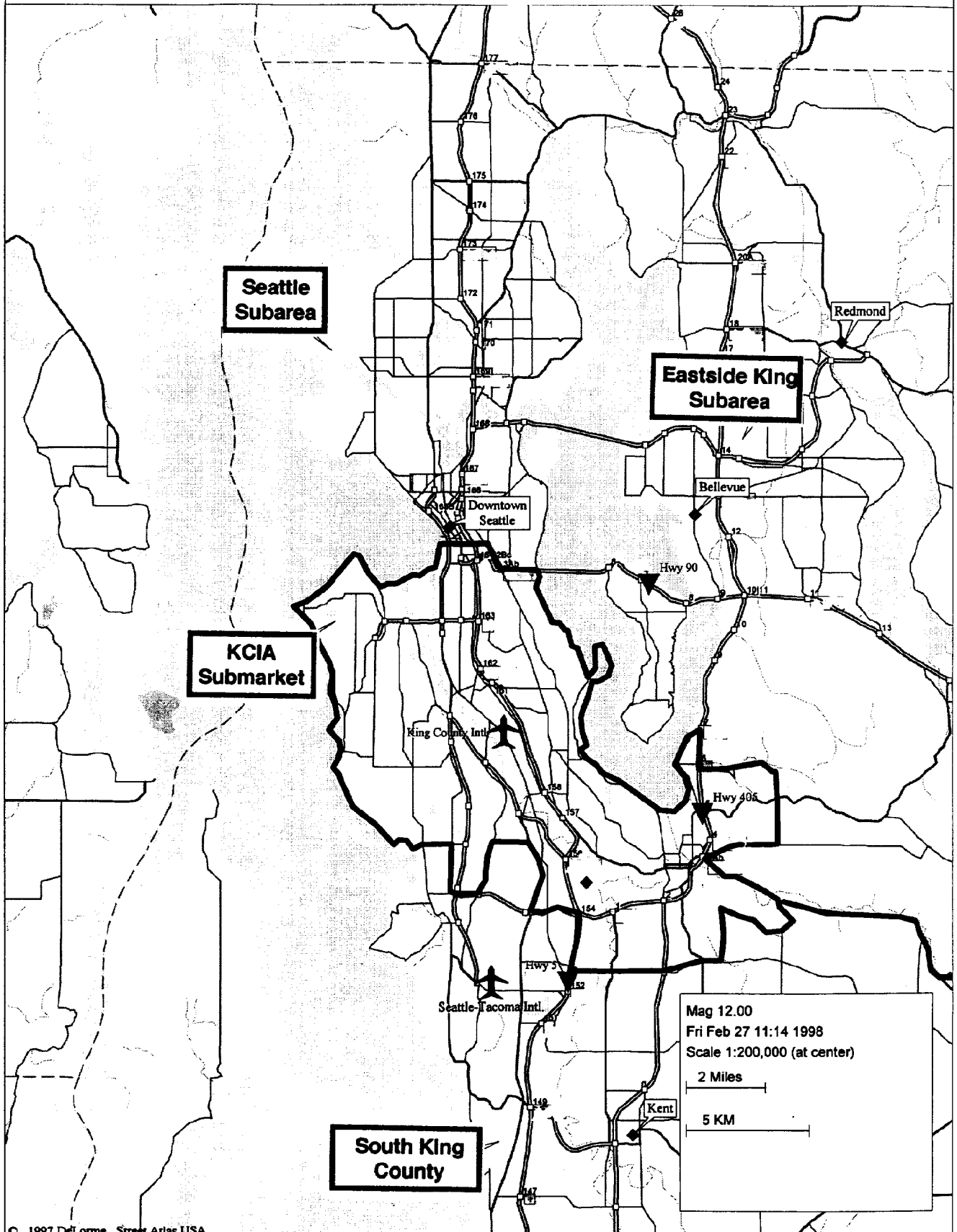
(2) Includes Finance, Insurance, and Real Estate.

(3) Includes all establishments in SIC Codes 8600 and 8399.

(4) Does not include state, local, or federal government employment.

Source: US Department of Commerce; Economic & Planning Systems, Inc.

Figure II-1 KCIA Market A



**Table II - 3**  
**Employment Projections by Area: 1997 - 2010**  
**KCIA Conference Center Feasibility Study**

Area	Year			Avg. Annual Growth Rate
	1997	2000	2010	
Seattle Area (1)	344,553	358,195	414,492	1.4%
East King County (2)	205,764	219,546	258,652	1.8%
South King County (3)	171,909	180,991	211,819	1.6%
KCIA Submarket (4)	194,080	200,260	235,899	1.5%
Total (5)	916,307	958,992	1,120,862	1.6%
King County Airport Area As % of Total	21%	21%	21%	

- (1) Includes the following PSRC Forecast Analysis Zone (FAZ) groups: Shoreline, Seattle North, Seattle CBD, and Seattle Central.
- (2) Includes the following PSRC Forecast Analysis Zone (FAZ) groups: Newcastle, Issaquah/E. Sammamish, Mercer Island, Bellevue, Point Cities, Kirkland Area, Redmond Area, Northshore, Snoqualmie Valley, and Bothell.
- (3) Includes the following PSRC Forecast Analysis Zone (FAZ) groups: Federal Way, Auburn, Enumclaw, Tahoma/Raven Heights, Soos Creek, Kent, Vashon Island, and portions of Highline/Des Moines/Sea Tac.
- (4) Includes the following PSRC Forecast Analysis Zone (FAZ) groups: Seattle South, Tukwila, Renton/Skyway and portions of Highline/Des Moines/Sea Tac.
- (5) Total excludes government and education sectors as well as the PSRC's external zones of King County.

Source: Puget Sound Regional Council (PSRC); Economic & Planning Systems, Inc.

**Table II - 4**  
**King County Airport Area Employment By Sector: 1997 - 2010**  
**KCIA Conference Center Feasibility Study**

Sector	Year			Growth Increment
	1997	2000	2010	
<b>Manufacturing</b>	74,166	72,839	68,832	(5,334)
<b>Wholesale Trade &amp; TCU (1)</b>	38,882	39,813	45,645	6,763
<b>Retail Trade</b>	30,360	32,045	39,996	9,636
<b>Services</b>	42,476	47,283	72,505	30,029
<b>Govt./Education</b>	21,912	23,091	25,528	3,616
<b>Total</b>	<b>207,795</b>	<b>215,071</b>	<b>252,506</b>	<b>44,711</b>

Source: Puget Sound Regional Council, Economic & Planning Systems, Inc.

## **DEMAND FOR MEETING SPACE**

### **Survey Results**

As part of this analysis EPS contacted representatives from over 30 large companies and/or non-profit establishments to obtain information on their meeting space requirements. The results of these interviews were supplemented by a mailed survey, conducted by the KCIA, to establishments located near the facility. The information from these surveys is summarized in **Table II-5** and **Table II-6**, respectively.

As shown in **Table II-5**, overall 65 percent of the establishments interviewed reported that the existing meeting space in King County did not meet their needs. Specifically, these establishments reported experiencing varying degrees of difficulty finding the type of space needed on their preferred date and/or location. The survey results also indicate that, on average, establishments with more than 100 employees require outside meeting or event facilities about six times per year, with non-profits or associations exhibiting a slightly higher annual requirement than businesses. Finally, the results suggest that overnight accommodations are required about 40 percent of the time.

The results from the KCIA mailed survey are relatively consistent with those described above. As shown in **Table II-6**, on average the 43 respondents contacted required meeting or event facilities about seven times per year. In addition, about 43 percent of these meetings require overnight accommodations. Overall, about 50 percent of those who returned the mailed surveys reported having a need for outside meeting or event facilities.

These results reported above are relatively conservative compared to data reported in other publications. For example, a national survey conducted by Reed Travel Group Need found that corporate meeting planners conduct an average of about 13 meetings in outside facilities per year per year compared to 18 per year for associations. These averages do not include data from firms with minimal or no meeting demand.

### **Demand Forecast**

The survey results described above can be combined with King County employment projections presented earlier to provide a quantitative estimate of total meeting space demand. As a first step in this process, EPS calculated the projected number of firms with more than 100 employees located in King County and the KCIA submarket area. As shown in **Table II-7**, there are currently an estimated 1,335 firms in King County that fall into this category, about 280 of which are located in the KCIA area. This number is projected to grow to about 1,630 in King County and 345 in the KCIA submarket by the year 2010.

**Table II - 5**  
**Survey of Potential Users**  
**KCIA Conference Center Feasibility Study**

Company Name/ Location	# of Employees	# of Events Per Year (2)	Are Existing Facilities Adequate?	% of Meetings Re-Scheduled Or Delayed	Need for Overnight Accommodations	Avg. Meeting Size
<b>Businesses</b>						
(1) Nordstroms Seattle	40,000	3	Yes	0%	High	100
(2) Weyerhaeuser Co. Tacoma	38,000	300	No	50%	Moderate	50
(3) Eagle Hardware & Garden Renton	5,100	10	No	5%	Seldom	60
(4) Quality Food Centers Bellevue	4,400	3	Yes	0%	Moderate	700
(5) Paccar Inc. Bellevue	17,000	2	Yes	0%	Seldom	NA
(6) Safeco. Corp. Seattle	7,500	10	Yes	0%	High	35
(7) Eddie Bauer Inc. Redmond	10,200	12	No	25%	Moderate	Varies
(8) Fisher Companies Inc. Seattle	1,100	20	No	NA	Seldom	20
(9) Sellen Construction Seattle	500	4	Yes	0%	High	60
(10) Icdie Seafoods Seattle	1,800	1	No	0%	Moderate	40
(11) Ocean Beauty Seafoods Seattle	1,300	0	Yes	0%	NA	NA
(12) Airborne Freight Corp. Seattle	20,700	2	Yes	0%	High	20
(13) Expeditors International Seattle	3,250	20	No	25%	Moderate	45
(14) Fluke Corp. Everett	2,500	3	No	100%	High	40
(15) Swedish Health Services Seattle	3,900	0	Yes	0%	NA	NA
(16) Trident Seafoods Seattle	2,500	0	Yes	0%	NA	NA
(17) Seattle Pacific Industries Seattle	340	13	Yes	0%	Moderate	Varies
(18) Attachmate Corporation Bellevue	1,800	8	Yes	0%	Seldom	20
(19) Seattle Times Company Seattle	3,000	0	Yes	0%	Seldom	NA
(20) Multiple Zones International Renton	750	7	No	0%	Moderate	Varies
(21) Advanced Technology Labs. Bothel	2,700	10	No	0%	Moderate	Varies
(22) Spacelabs Medical Inc. Redmond	1,374	2	Yes	0%	Seldom	Varies
(23) PriceCostco Issaquah	7,000	4	Yes	0%	Moderate	500
<b>Average</b>	<b>7,683</b>	<b>6</b>	<b>Yes = 60%</b>	<b>3%</b>	<b>Yes = 47% (3)</b>	<b>NA</b>
<b>Non-Profits/Associations</b>						
(24) World Vision Inc Federal Way	7,340	12	Yes	0%	Never	12
(25) KCTS Television Seattle	200	14	Yes	0%	Seldom	45
(26) Pioneer Human Services Seattle	7,000	3	Yes	0%	Never	30
(27) Puget Sound Blood Center Seattle	600	5	Yes	0%	Seldom	20
<b>Average</b>	<b>3,785</b>	<b>9</b>	<b>Yes = 100%</b>		<b>Yes = 5% (3)</b>	<b>27</b>
<b>Total</b>	<b>5,734</b>	<b>6</b>	<b>Yes = 65%</b>		<b>Yes = 39% (3)</b>	

(1) Includes employees outside Puget Sound area. However, most firms listed have over 100 employees locally.

(2) Includes meetings, conferences, training seminars, and other events.

(3) Assumes that Seldom equals 10 percent, Moderate 50 percent, and High 90 percent.

Source: Economics & Planning Systems, Inc.



**Table II - 6**  
**Airport Survey Results**  
**KCIA Conference Center Feasibility Study**

Employees	Total Respondents (1)	# of Firms Requiring Space		Avg. Meeting Days/Year					Avg. Meeting Size (2)	% Requiring Overnight Accommodations
		Total	Percent	0 - 2	3 - 7	8-19	20+	Average		
Over 100	9	8	89%	3	2	2	2	20	20	88%
Under 100	2	0	0%	2	0	0	0	0	NA	NA
Size Not-Reported	32	13	41%	24	4	2	2	4	29	15%
<b>Total</b>	<b>43</b>	<b>21</b>	<b>49%</b>	<b>29</b>	<b>6</b>	<b>4</b>	<b>4</b>	<b>7</b>	<b>26</b>	<b>43%</b>

(1) Out of the 150 surveys mailed, approximately 43 were returned.  
(2) Average from firms who reported that they use outside facilities.

Source: King County International Airport, Department of Construction & Facilities; Economic & Planning Systems, Inc.

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**Table II - 7**  
**Employment by Firm Size and Area: 1997 - 2010**  
**KCIA Conference Center Feasibility Study**

Employment/Area	Year		
	1997	2000	2010
<b><u>Total Employment</u></b>			
KCIA Submarket	194,080	200,260	235,899
Rest of King County	722,227	758,732	884,963
<b>Total King County</b>	<b>916,307</b>	<b>958,992</b>	<b>1,120,862</b>
<b><u>Employment in Firms &gt; 100 (1)</u></b>			
KCIA Submarket (2)	98,292	101,421	119,471
Rest of King County	365,771	384,259	448,188
<b>Total King County</b>	<b>464,063</b>	<b>485,680</b>	<b>567,659</b>
<b><u>Number of Firms &gt; 100 (3)</u></b>			
KCIA Submarket	283	292	344
Rest of King County	1,052	1,105	1,289
<b>Total King County</b>	<b>1,335</b>	<b>1,397</b>	<b>1,633</b>

- (1) Businesses and non-profits/associations with more than 100 employees account for about 51% of total employment.  
(2) Assumes that the KCIA submarket maintains the same proportion of businesses with more than 100 employees as the County as a whole.  
(3) Based on an estimated average of 348 employees per establishment.

Source: US Dept. of Commerce; PSRC; Economic & Planning Systems, Inc.

Using the assumption that establishments with more than 100 employees require an average of six meetings per year, the firm count estimates provided above can be translated into total demand for meeting space. This calculation is performed in Table II-8. As shown, based on this methodology local establishments with more than 100 employees generate demand for approximately 8,000 meeting days per year in the County including 1,700 per year in the KCIA submarket. This number is projected to grow to 9,800 in King County including 2,060 in the KCIA submarket by the year 2010. It is worth noting that this calculation assumes that both businesses and associations/non-profits demand approximately six meetings per year. To the extent that associations/non-profits have a slightly higher annual requirement, the estimates provided in Table II- 8 are conservative.

It is also important to note that the above estimates do not account for demand generated by social functions or government institutions. Although both sources are expected to add to total market demand, their relative contributions are difficult to estimate using only employment data. As a result, these factors are estimated separately for the KCIA facility in Chapter IV.

**Table II - 8****Current & Projected Conference Room Demand: 1997 - 2010  
KCIA Conference Center Feasibility Study**

Source of Demand	Meeting Room Day Demand By Year		
	1997	2000	2010
KCIA Submarket (1)	1,696	1,750	2,062
Rest of King County (1)	6,312	6,631	7,734
Total Demand (3)	8,008	8,381	9,796

(1) Assumes that establishments with more than 100 employees generate demand for 6 meeting days per year on average

(2) Does not include demand from social functions or government offices.

Source: US Department of Commerce; Puget Sound Regional Council; Economic & Planning Systems, Inc.

### III. COMPETITIVE FACILITIES IN THE TRADE AREA

---

This chapter describes existing and planned facilities with meeting rooms and ballrooms that will compete for a portion of KCIA's proposed conference facility's clientele.

**Table III-1** provides a summary of facilities by type, number of rooms, square feet, and capacity for the Seattle region. Discussions with facility operators, meeting and event planners, and estimates of regional demand confirm that overall, the region is underserved. Events are often delayed, moved to less ideal locations, or cancelled due to the lack of available space. Anticipated employment growth and Seattle's growing position as a national destination is likely to exacerbate this trend, however, additions to the supply of facilities will partially mitigate the shortfalls.

The existing facilities are divided into three general geographic groups as described below:

- **South King County**, includes the cities of Des Moines, SeaTac, Kent, Renton, and the King County International Airport;
- **Bellevue/East Side**, includes the cities of Bellevue, Kirkland, Redmond, Bothell, and Issaquah; and
- **Seattle**, includes the City of Seattle.

Conference and meeting facilities in Tacoma, such as the Tacoma Convention Center, are not included; however, it is important to indicate that corporate, non-profits and social users who are located in or near the Tacoma area, will most likely use those facilities, rather than drive to KCIA to hold events. Conversely, there may be some users that will drive to KCIA if no other options exist.

Data on each facility was obtained by contacting the facilities and city planning departments, as well as by reviewing existing facility planning documents and brochures. If the meeting room or ballroom square footage and capacity was not available, standard assumptions are applied. The meeting room capacity is based on classroom configuration at 30 square feet per person; the ballroom capacity is based on theater style configuration, at 10 square feet per person.

The following sections describe key facilities in the Seattle region that will compete for a portion of KCIA Conference Center's clientele. For most of the conference facilities and a few convention, other facilities, or hotels, the number of meeting rooms and ballrooms, and their respective square feet and capacity were obtained or estimated.

**Table III-1**  
**Summary of Existing Facilities by Type**  
**KCIA Conference Center Feasibility Study**

Facility	Meeting Rooms			Ballrooms		
	#	Sqft	Capacity	#	Sqft	Capacity
Convention Facilities	72	197,696	34,952	3	59,000	6,000
Conference Facilities	76	102,209	3,871	6	100,388	4,800
Other Facilities (1)	6	283,330	9,602	4	213,100	18,420
Hotels with Meeting Spaces	375	336,054	11,202	18	181,786	18,179
<b>Total</b>	<b>529</b>	<b>919,289</b>	<b>59,626</b>	<b>31</b>	<b>554,274</b>	<b>47,399</b>

(1) Facilities used mainly for purposes other than meetings and conferences, excluding yachts and boats.  
 Data only includes nine of the eighteen other facilities; see Table III-3 for detailed information.

Sources: Respective facilities; Seattle, Washington Meeting Planners Guide; East King County Convention and Visitors Bureau; Economic & Planning Systems, Inc.

## CONVENTION FACILITIES

King County has three major facilities: Kingdome, Seattle Center, and Washington State Convention and Trade Center that all focus on large events, including national conventions, trade shows and exhibitions. These facilities host large events and cater to user groups different from those proposed at the KCIA conference facility; the convention facilities' primary focus is to serve regional and national markets. As shown in **Table III-2**, there are an estimated 72 meeting rooms and three ballrooms, with a total capacity of 35,000 and 6,000 people respectively. The Kingdome will be torn down in 2000, but in its place will be a new football stadium and an adjacent exposition hall, as described further in the **Planned Expansion and New Convention and Conference Facilities** section in this Chapter.

## CONFERENCE FACILITIES

In King County, thirteen conference facilities will compete for a significant portion of KCIA conference facilities' business, as shown in **Table III-2**. **Figure III-1** indicates their approximate locations. Six of the thirteen facilities are located in the Bellevue/East Side area, but are scattered among the cities of Bellevue, Bothel, Issaquah, and Redmond. The City of Seattle contains five conference and meeting facilities, and South King County contains only two facilities. Five of the 13 facilities offer overnight stays, while other facilities are within walking distance of hotels, with the exception of Museum of Flight and the Overlake Hospital Conference Center. The majority of these conference facilities serve the local market, primarily corporate businesses, non-profits, and social groups

### SOUTH KING COUNTY

In the South King County area, there are two facilities, the Museum of Flight and the Dumas Bay Centre. The Museum of Flight is located at the King County International Airport and the Dumas Bay Centre is in Federal Way. The facilities have a combined total of nine meeting rooms that total 17,000 square feet for 500 people, as well as one ballroom that totals 78,000 square feet for 2,500 people. These facilities serve mostly local businesses, as well as some national businesses for conferences, meetings and banquets.

**Museum of Flight.** The Museum of Flight is located on the southwest corner of King County International Airport and will be the predominant competitor of the proposed conference center at KCIA because of their proximity to each other. According to the Museum of Flight, business is currently very strong. The facility had approximately 100 percent increase in the number of functions in the last year (1997). Within the next three to five years, the Museum of Flight plans to expand and envisions becoming "the largest special events facility on the West Coast", with a capacity from 5,000 to 6,000 people for receptions. The Museum of Flight is a non-profit facility that contains four meeting

**Table III-2**  
**Existing Convention and Conference Facilities**  
**KCIA Conference Center Feasibility Study**

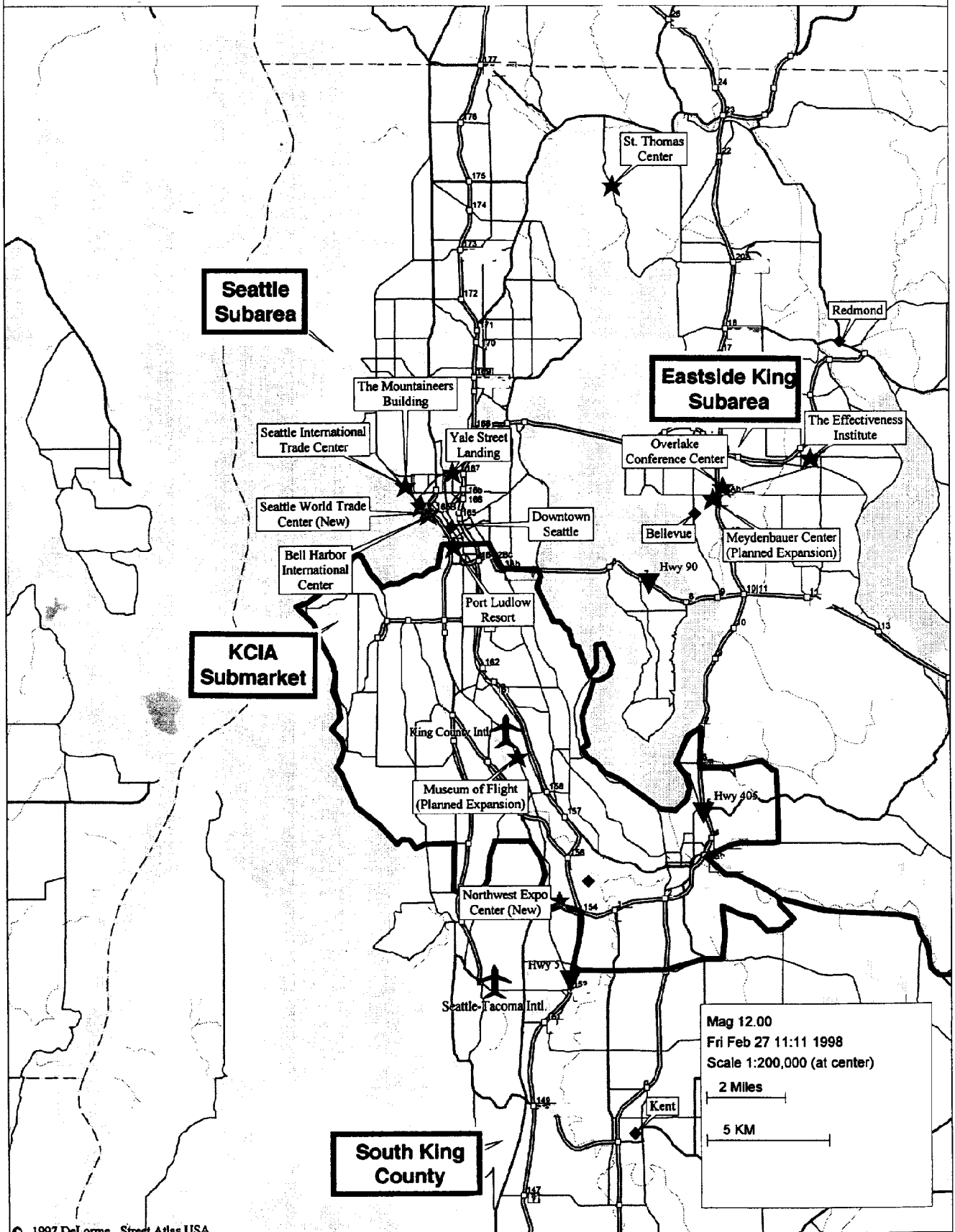
Facility	City	Meeting Rooms			Ballrooms			Notes	Primary Users	User Type
		#	Sqft	Capacity (1)	#	Sqft	Capacity (2)			
CONVENTION FACILITIES										
Kingdome	Seattle	3	8,700	290	0	0	0 Stadium	n/a		National
Seattle Center	Seattle	15	82,000	26,040	1	14,000	1,500 Exhibit Hall 40,000 sqft	n/a		National
Washington State Convention & Trade	Seattle	54	108,996	8,622	2	45,000	4,500 Exhibit Hall 102,000sqft, Atrium 18,000 sqft	n/a		National
Total Convention Facilities		72	197,696	34,952	3	59,000	6,000			
CONFERENCE FACILITIES										
South King County										
Museum of Flight	Seattle	4	10,201	258	1	78,370	2,500 Displays of 50 aircrafts	Corporate business		Local/national
Dumas Bay Centre	Federal Way	5	7,020	234	n/a	n/a	n/a 70 beds, passive park	Conferences, meetings, banquets		Local
Subtotal		9	17,221	492	1	78,370	2,500			
Bellevue/East Side										
Meydenbauer Convention Center	Bellevue	4	12,000	690	n/a	n/a	n/a 410 seat theater, 36,000 sqft exhibit hall	conventions, meetings, tradeshow		Regional
Overlake Hospital Conference Center	Bellevue	4	3,919	156	n/a	n/a	n/a 156 seat auditorium	Hospital staff		Local
St Thomas Conference Center	Bothell	15	10,975	366	1	3,000	300 weekends only, 125 seat theater, 79 beds	Non-profits: religious and education		Local
Loma Center for Renewal	Issaquah	5	12,000	400	n/a	n/a	n/a 52 sleeping rooms	n/a		n/a
The Effectiveness Institute, Inc.	Redmond	3	1,345	51	n/a	n/a	n/a Part of the Effective Institute Company	Conference, seminars, meetings		Local
Seabeck Conference Center	Seabeck	12	7,500	250	n/a	n/a	n/a non-profits only, 250 beds on 90 acres	Churches, family groups		Regional
Subtotal		43	47,739	1,913	1	3,000	300			
Seattle										
Bell Harbor International Conference	Seattle	11	11,986	470	1	3,952	500 Exhibit hall 4,200 sqft	Corporate-training, product launches		Local
Port Ludlow Resort & Conference	Seattle	6	4,877	134	1	2,166	210 400 seat auditorium, 140 guest rooms	exec. planning sessions		n/a
Seattle International Trade Center	Seattle	n/a	7,500	250	1	10,000	1,000 Space for exhibits and trade shows	Associations- conferences		Regional
The Mountaineers Building	Seattle	5	9,686	505	1	2,900	290 n/a	The Mountaineers/local socials		Local
Yale Street Landing	Seattle	2	3,200	107	n/a	n/a	n/a n/a	corporate conferences, banquets		Local/national
Subtotal		24	37,249	1,486	4	19,018	2,000			
Total Conference Centers		76	102,209	3,871	6	100,388	4,800			

- (1) Conference 30 sqft/person unless the data is already provided.  
 (2) Theater 10 sqft/person unless the data is already provided.

Sources: Respective facilities; Seattle, Washington Meeting Planners Guide; East King County Convention and Visitors Bureau; Economic & Planning Systems, Inc.



Figure III-1 Existing and Planned Conference Facilities



rooms and one ballroom. The meeting rooms total 10,200 square feet for 260 people in a conference setting, and the ballroom is 78,000 square feet with capacity for 2,500 people in theater style seating. The facility hosts 500 events a year, of which, approximately 80 percent are local businesses who conduct meetings and conferences. The average number of people per event for the local businesses is 150. The other 20 percent are national and international businesses that host social events, and the average attendance for these events is 1,000 people per event.

Advantages of the facility include access to the Museum, 800 free parking spaces, a variety of meeting spaces, and proximity to the Boeing Field to fly out to events.

### SEATTLE

The City of Seattle includes five conference centers and meeting facilities. The centers contain approximately 24 meeting rooms that total 37,000 square feet, with a capacity of 1,500 people. In addition, there are four ballrooms that total 19,000 square feet, with a capacity of 2,000 people. The annual number of events ranges from 35 to 360, depending on the facility and type of event. These facilities primarily serve the local groups, as well as some regional and national groups for corporate training, product launches, tradeshow, executive-planning sessions, and banquets.

### BELLEVUE/EAST SIDE

The Bellevue/East Side area consists of six conference and meeting facilities, scattered among various cities, including Bellevue, Bothell, Issaquah, and Redmond. These facilities contain approximately 43 meeting rooms and one ballroom that total 48,000 square feet and 3,000 square feet respectively. The clientele is principally local and regional businesses, non-profit organizations, and religious and family groups for conventions, tradeshow, corporate meetings and seminars, and religious and family events.

### **OTHER FACILITIES**

Approximately 18 other facilities are located in the Seattle region that provide meeting and conference spaces. However, these uses are not primary competition. As shown in Table III-3, they include community colleges and centers, universities, halls, and institutions that rent their spaces when they are not used for their primary functions (e.g. classes). Of the 18 facilities, seven are located in the Bellevue/East Side area.

**Table III-3  
Other Facilities  
KCIA Conference Center Feasibility Study**

Facility (1)	City	Meeting Rooms			Ballrooms			Notes	Primary Users	User Type
		#	Sqft	Capacity (1)	#	Sqft	Capacity (2)			
Bellevue/East Side										
Bellevue Community College	Bellevue	n/a	84,000	2,800	n/a	28,000	2,800	Theatre-style seating in gym	Corporate businesses	Local
North Bellevue Community Center	Bellevue	n/a	n/a	n/a	n/a	4,500	450	n/a	n/a	n/a
Puget Sound Power and Light	Bellevue	n/a	3,000	100	n/a	n/a	n/a	Non-profit use only	n/a	n/a
Rockwell Institute	Bellevue	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Vasa Park Resort and Ballroom	Bellevue	n/a	27,000	900	n/a	9,000	900	No rock bands, wedding or receptions	n/a	n/a
VFW Hall	Bellevue	n/a	9,000	300	n/a	5,400	540	n/a	n/a	n/a
Wintergarden at Bellevue Place	Bellevue	n/a	n/a	n/a	n/a	7,000	700	Glass-domed enclosed court.	n/a	n/a
Subtotal			123,000	4,100	n/a	53,900	4,490			
South King County										
North Kirkland Community Center	Kirkland	n/a	7,350	245	n/a	2,450	245	Multi-purpose room	minimal rental-weddings.	Local
Issaquah Community Center	Issaquah	2	1,440	56	1	14,400	1,000	new facility, free parking	dinner dances, conventions, trade show	Local
Eagles Hall	Redmond	1	875	100	n/a	n/a	n/a	limited kitchen facilities	funerals, weddings, parties	Local
Subtotal		3	9,665	401	1	16,850	1,245			
Seattle										
Bernaroya Hall	Seattle	n/a	n/a	n/a	n/a	25,000	2,500	500 seat recital hall, 470 seat lobby	n/a	n/a
Gameworks	Seattle	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Omnidome	Seattle	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Pacific Science Center	Seattle	n/a	12,000	400	n/a	30,000	3,000	n/a	n/a	n/a
Russion Community Center	Seattle	n/a	n/a	n/a	n/a	2,000	200	n/a	n/a	n/a
Seattle Space Needle	Seattle	n/a	6,000	200	n/a	3,500	350	In-housing catering only	n/a	n/a
Seattle University	Seattle	n/a	n/a	n/a	n/a	n/a	n/a	Only for non-profit educational groups	n/a	n/a
The Seattle Design Center	Seattle	n/a	n/a	n/a	2	11,100	900	Only available weekends and evenings	socials-weddings, reunions	Local
Subtotal										
Total		6	283,330	9,602	4	213,100	18,420			

- (1) Facilities used mainly for purposes other than meetings and conferences, excluding yachts and boats.  
 (2) Conference 30 sqft/person unless the data is already provided.  
 (3) Theater 10 sqft/person unless the data is already provided.

Sources: Respective facilities; Seattle, Washington Meeting Planners Guide; East King County Convention and Visitors Bureau; Economic & Planning Systems, Inc.

Facilities include the Bellevue Community College and the Rockwell Institute, both of which are located in the city of Bellevue. Based on interviews with several of these facilities, most of the users are local groups who rent the spaces for social events, such as weddings, parties, funerals, and reunions.

## **HOTELS WITH MEETING ROOMS**

Hotels with meeting and ballroom spaces tend to attract different types of user groups than those likely to patronize a facility at the King County International Airport. Hotels prefer to reserve meeting and ballroom spaces for groups who need overnight accommodations, rather than to rent to those who do not need overnight stays. As shown in **Table III-4** and **Figure III-2**, the King County region includes an estimated 66 hotels with 375 meeting rooms and 18 ballrooms. The table lists the number of hotels, and estimates of the meeting and ballroom square feet and capacity by region. For additional information on a selected number of hotels with meeting spaces, see **Appendix B**.

## **PLANNED EXPANSIONS AND NEW CONVENTION AND CONFERENCE FACILITIES**

Six new and existing conference and convention facilities in the King County region are either expanding or will be constructed to accommodate additional demand, as well as to compete with other facilities in the area, as shown in **Table III-5**.

Two of the three new facilities that total 453,000 square feet will be built for exhibitions. The third, the Seattle World Trade Center, will have approximately four meeting rooms that total 2,700 square feet.

Besides the new facility developments, three facilities plan to expand, two of which are located in Seattle South King County, and the other in Bellevue.

### **PLANNED EXPANSIONS**

**Meydenbauer Center.** Meydenbauer Center, located in Bellevue, plans to expand its exhibit space from 36,000 square feet to 54,000 square feet and add a 26,000-square foot ballroom. Moreover, the facility will have an expanded garage. Expansion will begin in 1999 and open in either 2001 or 2002. Along the peripherals of the Meydenbauer Center, new office, hotel and retail developments will occur, including 146,000 square feet of retail, 47,000 square feet of restaurants, a 14-screen 90,000-square-foot theater, 530,000 square feet of office space, and a 560-room hotel. Estimated date for this development is unknown. The developer of this project has not submitted an application for the City to prepare the EIR.

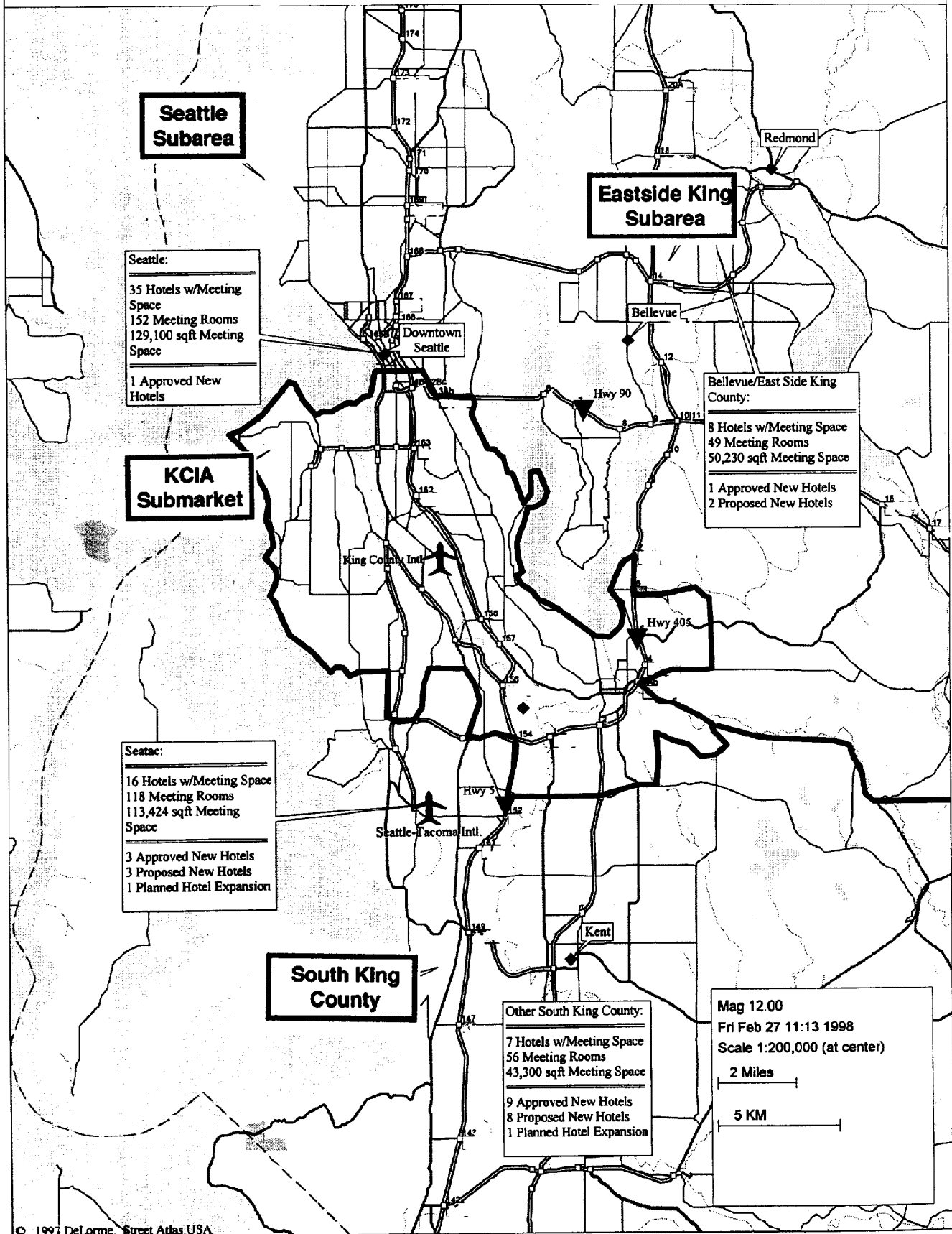
**Table III-4**  
**Estimated Hotel Meeting and Ballroom Space**  
**KCIA Conference Center Feasibility Study**

By Region (1)	# of Hotels	Meeting Rooms			#	Ballrooms	
		#	Sqft	Capacity (2)		Sqft	Capacity (3)
Seattle	35	152	129,100	4,303	16	98,907	9,891
Bellevue/East Side (4)	8	49	50,230	1,674	7	28,468	2,847
South King County (5)							
Seatac	16	118	113,424	3,781	8	42,122	4,212
Other	7	56	43,300	1,443	3	12,289	1,229
Subtotal	23	174	156,724	5,224	11	54,411	5,441
<b>Total</b>	<b>66</b>	<b>375</b>	<b>336,054</b>	<b>11,202</b>	<b>18</b>	<b>181,786</b>	<b>18,179</b>

- (1) Outside King County, in the cities of Tacoma, Lynnwood, Baline and Everett, there are eight hotels with 61 meeting rooms totaling 70,800 sqft and 6 ballrooms totaling 48,226 sqft.  
(2) Assumes 30 sqft/person in conference setting.  
(3) Assumes 10 sqft/person in theater setting.  
(4) Include the Cities of Bellevue, Krikland, and Issaquah.  
(5) Include the Cities of Des Moines, Renton, Sea Tac, Kent, Auburn, and Federal Way.

Sources: Seattle Convention and Visitors Bureau Meeting Planners Guide, Respective hotels;  
Economic and Planning Systems, Inc.

**Figure III-2 Hotels with Meeting Space**



**Table III-5  
Planned Expansions or New Convention and Conference Facilities  
KCIA Conference Center Feasibility Study**

Name	Address	City	Sqft		Total Size
			Existing Size	Expansion Size	
<b><u>New Facilities</u></b>					
Northwest Expo Center	.5 mile from I-5/Right off 405	Tukwila	n/a	150,000	150,000
Seattle World Trade Center (1)	2200 Alaskan Way	Seattle	n/a	2,700	2,700 (2)
Exhibition Hall at Seahawk Stadium	S. of Kingdome	Seattle	n/a	300,000	300,000
<b>Subtotal</b>				<b>452,700</b>	<b>452,700</b>
<b><u>Planned Expansions</u></b>					
Meydenbauer Center	11100 NE 6th	Bellevue	36,000	44,000	80,000
Washington State Convention and Trade Center	800 Convention Place	Seattle	102,000	150,000	252,000
Museum of Flight	9404 East Marginal Way South	Seattle	n/a	n/a	n/a
<b>Subtotal</b>			<b>138,000</b>	<b>194,000</b>	<b>332,000</b>
<b>Total</b>				<b>646,700</b>	<b>784,700</b>

(1) Includes conference space only.

(2) Assumes 30 sqft/person: Conference.

Sources: Respective Facilities; Economic & Planning Systems, Inc.

The force behind the Meydenbauer's expansion and the new office/retail/hotel development is driven by the expansion of local businesses, such as Microsoft.

**Museum of Flight.** The Museum of Flight, located at the KCLIA, plans to expand within the next three to five years. Expansion plans have not been set yet.

**Washington State Convention and Trade Center.** The Washington State Convention and Trade Center, located in Seattle, will be expanding from 102,000 square feet to an additional 150,000 square feet. The facility will be 252,000 square feet. Expansion begins July 1998 and will be completed by 2000.

### NEW FACILITIES

**Northwest Exposition Center.** The Northwest Exposition Center will be a privately owned and operated 150,000-square foot exhibit facility located in Tukwila. The facility will be located approximately .5 miles from I-5 and I-405 and contain 150,000 of exhibition space, lobby and meeting rooms. Of the 150,000 square feet, about 4,600 square feet, or two rooms will be dedicated to meetings. The Northwest Exposition Center will cater to three types of events: 1) local and regional consumer shows (e.g., home shows, arts and crafts, and antiques); 2) regional and national industry tradeshow; and 3) corporate parties, banquets, and association meetings. The Center predicts about 250 to 260 event days. Construction will begin May 1998 and be completed in December 1998. Adjacent to the Expo Center, Boeing purchased a former racetrack, which will be converted into its headquarters within five years. The Northwest Exposition Centers plans to attract additional business from the Boeing Company.

**Seattle World Trade Center.** Seattle World Trade Center is a 300,000-square foot facility located in Seattle. The estimated opening date is July 1998. The building will have four meetings room, with a total capacity of 90 people. The dining room, which fits 40 people will also be available in the evenings. The rooms will be available to the public, but priority goes to the Trade Center members.

**Exposition Hall at Seahawk Stadium.** The Exposition Hall at Seahawk Stadium will be a 300,000-square foot facility by 1999 as part of Phase I, and will increase another 80,000 sqft by 2002 as part of phase II. The Exposition Hall will be located on a parking lot next to the Kingdome, which will be torn down in 2000.

### **NEW AND EXPANDING HOTELS**

Numerous hotel developments are planned, approved, or expanding, some of which will have meeting and ballroom spaces. As discussed previously in the Hotel with Meeting Space section, hotels with meeting spaces are geared to groups who need overnight accommodations, whereas the KCLIA conference facility is targeted to those



who do not need overnight stays. Cities in the area were contacted to determine how much new hotel development is occurring, as described below, which may affect the amount and type meeting spaces in the region.

In the King County region there are 26 approved and proposed hotels, with approximately 3,200 hotel rooms, as shown in Table III-6. Of the 26, 14 are approved hotel developments in the area, with approximately 1,500 guestrooms. The South King County area contains 12 of the approved hotel developments, almost divided evenly among the cities of Federal Way, Kent, Renton and SeaTac. Seattle and Bellevue/East Side contains a couple of approved hotel developments, however, EPS did not obtain sufficient information from the City of Seattle to determine the exact number of new hotel developments.

Besides approved hotel development, the King County region contains 12 proposed hotel developments that total approximately 1,600 hotel rooms. About 10 of the 12 hotels are located in the South King County area, primarily in the cities of Kent and SeaTac.

**Table III-6**  
**Planned, Proposed or Expanding Hotels**  
**KCIA Conference Center Feasibility Study**

Area/Hotel Name (1)	City	Number of Rooms
<b>APPROVED NEW HOTELS</b>		
<b>South King County</b>		
Travelodge	Des Moines	51
Comfort Inn	Federal Way	117
Courtyard by Marriott	Federal Way	160
Country Inn Motel	Kent	n/a
Galaxy Enterprises Motel	Kent	n/a
Pacific Highway Motel	Kent	72
Larkspur Landing Hotel	Renton	134
Hilton	Renton	150
Extended Stay America	Renton	110
Westin Hotel at Airport	Seatac	297
Main Stay Hotel	Seatac	149
Sleep Inn Hotel	Seatac	100
Subtotal		1,340
<b>Seattle (2)</b>		
Marriott	Seattle	n/a
<b>Bellevue/East Side</b>		
Extended Stay America	Bellevue	136
<b>Total Approved</b>		<b>1,476</b>
<b>PROPOSED HOTELS</b>		
<b>South King County</b>		
Ramada Inn	Des Moines	95
Holiday Inn	Federal Way	165
Extended Stay America	Kent	120
Extended Stay America	Kent	133
Extended Stay America	Kent	120
Knights Inn	Kent	87
Stonebrooks Suites	Kent	48
SeaTac II Hotel	Seatac	173
Unknown Hotel	Seatac	100
Unknown Hotel	Seatac	70
Subtotal		1,111
<b>Bellevue/East Side</b>		
Lincoln Square	Bellevue	500
Unknown Name	Kirkland	n/a
Subtotal		500
<b>Total Proposed</b>		<b>1,611</b>
<b>HOTEL EXPANSIONS</b>		
<b>South King County</b>		
Comfort Inn at Sea-Tac	Seatac	122
Choice Lodge	Kent	24
Subtotal		146
<b>Grand Total Hotel Rooms</b>		<b>3,233</b>

(1) Some hotels will have meeting and ballroom spaces, but the actual number is unknown.

(2) The city of Seattle has other approved and planned hotel developments, but EPS was not able to obtain the information.

Sources: Respective cities; Economic & Planning Systems, Inc.

Economic & Planning Systems, Inc. 3/2/98

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## IV. DESCRIPTION OF THE PROPOSED KCIA FACILITY

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### FACILITIES

**Figure IV-1** illustrates a conceptual plan for utilization of the Arrivals Building for a conference facility. The plan is not intended to represent a recommendation, but it does show that the reuse of the Arrivals Building could provide adequate space for a full range of conference center facilities that could accommodate 250 to 500 people in large halls and small meeting rooms, depending on the nature of the events.

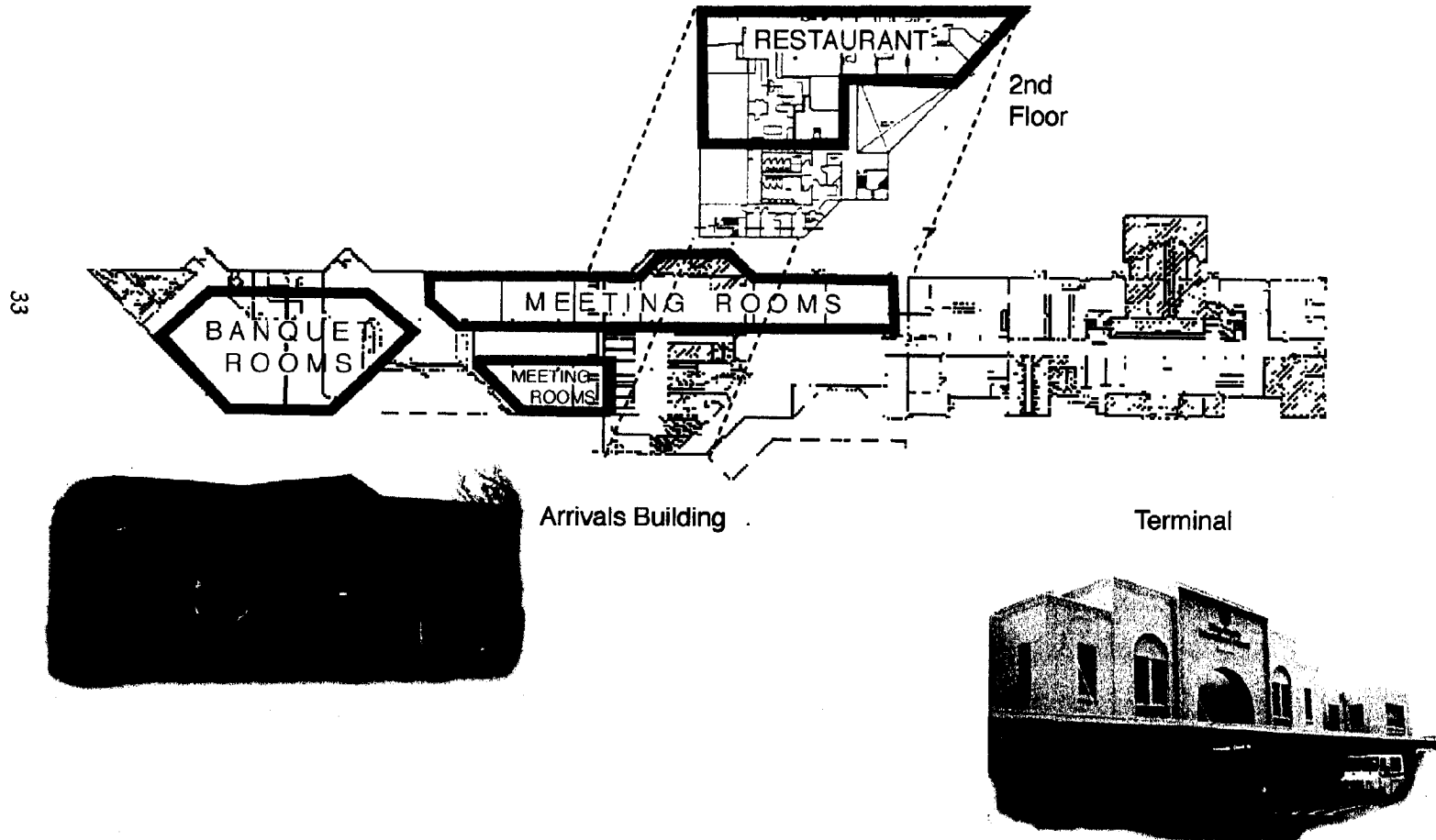
**Table IV-1** summarizes the capacity of the Arrivals Building. The banquet hall totals 5,000 square feet, and could accommodate up to 500 people in theater-style seating. The hall could be subdivided and serve a number of different types of events, including general sessions, banquets, auctions, product rollouts and demonstrations, and limited exhibit space. Approximately 10 meeting rooms averaging 1,000 square feet each are shown; these rooms could be further divided to create smaller spaces. In addition to the use of the existing restaurant/lounge area, banquets and informal dining could be accommodated in the meeting rooms as well

A number of other options for facility use and configuration exist:

- Less than full utilization of the Arrivals Building could be considered, particularly in light of the potential capture of trade area demand.
- A conference facility could utilize existing Terminal Building facilities in addition to the Arrivals Building, however, this may result in conflicts with existing tenants, reduce the identity and image of a single, cohesive conference center, and introduce additional management difficulties (coordinating events in disconnected locations, etc.).
- A significantly reduced option could be considered that only includes existing facilities, i.e., the existing lobby, restaurant/lounge, and office/classrooms in the Terminal Building. While the issues described above would apply, this option would involve much lower capital investments, and reduced levels of activity and management requirements.

The most feasible option depends on the ability of the facility to capture demand, the resulting investments required and the level of risk that the County is willing to undertake.

**Figure IV-1**  
**Conceptual Facility Configuration**  
**King County International Conference Center**



**Table IV-1**  
**Conceptual Facility Configuration**  
**King County Airport Conference Center Market Study**

Building Specifications	Sqft	Dimension (feet)	Capacity					
			Theater (1)	Banquet (2)	Reception (1)	Classroom (3)	Conference (4)	Exhibitors (5)
<u>Ballroom (9)</u>								
I	2,500	50 x 50	250	179	250	125	--	13
II	2,500	50 x 50	250	179	250	125	--	13
Subtotal	5,000	100 x 50	500	357	500	250	--	25
<u>Meeting Rooms (10)</u>								
900-1,100	30 x 35	100	71	100	50	33	5-15	(6)
Subtotal	9,000		900	643	900	450	297	
<u>Other Dining (7)</u>								
Lounge	1,747			134	(8)			
Dining Room	4,338			310	(8)			
Subtotal	6,085			444				
<u>Other Areas</u>								
Lobby	1,400							
Total Area	21,485							

- (1) Assumes 10 sqft/person: Theater and Reception.  
(2) Assumes 10 seats, 14 sqft/seat: Banquet.  
(3) Assumes 20 sqft/person: Classroom.  
(4) Assumes 30 sqft/person: Conference.  
(5) Assumes 200 sqft/booth: Exhibits (10' x 10' booth).  
(6) Two meeting rooms potentially could be combined to achieve the larger number.  
(7) Existing lounge and dining facilities could potentially be used for meetings, exhibits, or other services.  
(8) Source: King County International Airport Rate Schedule.  
(9) May be divisible into two rooms.  
(10) Nine rooms total, but may be divisible into smaller rooms.

Source: Economic & Planning Systems, Inc.; King County International Airport

## COMPETITIVE CHARACTERISTICS

### OPPORTUNITIES

A KCIA conference center would possess a number of competitive advantages that will help it to capture market demand:

**Accessibility** – KCIA is approximately six miles south of downtown Seattle, and is located just off Interstate 5. Although congestion is common during peak commute periods, the site is relatively convenient to the downtown. SeaTac Airport is located about 9 miles to the South. The KCIA submarket, see Chapter II, accounts for approximately 20 percent of total King County employment.

**Availability of Parking** – The airport currently has about 200 to 250 spaces, half of which are utilized by airport employees during the day. Airport staff have indicated that additional parking could be developed in order to serve larger events and attendance. The availability of free parking is a positive factor relative to other competing facilities with more limited, or costly parking.

**Type and Quality of Facilities** – KCIA could provide a broad range of facilities, including space to accommodate a general session or other major event of up to 500 people, along with adequate meeting space to accommodate individual break-out meetings. To compete effectively, it would be necessary that the space be of a high quality, with adequate soundproofing and ability to provide state-of-the-art audio visual without significant "line of sight" obstructions.

**Aviation "Theme"** – KCIA offers views of the surrounding mountains, as well as immediate views of airport operations. If this were enhanced by aviation related decor and historical aviation exhibits, the facility would be in a better position to attract social events and certain corporate events.

### CONSTRAINTS

Several characteristics of the KCIA conference center detract from its ability to compete with existing and planned facilities to capture demand:

**Location** – While the facility is located close to a significant amount of employment, and is reasonably convenient to downtown Seattle and the SeaTac Airport, the majority of King County employment and growth is occurring in the Eastside, which can involve a commute of 45 minutes or more (depending on the time of day and where the employees reside), and is already served by competing facilities. Similarly, areas to the south of the SeaTac airport have access to competing facilities (primarily the hotels at SeaTac and Tacoma), and their employment base will include areas of less expensive housing further south.

**Lack of Overnight Accommodations** -- Close proximity (typically as part of the facility or within walking distance) to overnight accommodations is important to events that include out-of-town participants. The absence of overnight accommodations, as well as the lack of restaurants, shops and other visitor amenities, eliminates the segment of the market that involves large numbers of visitors; however, the facility may be able to attract events sponsored by locally-headquartered companies with a predominance of employees from the local area.

**Competitive Facilities** -- The KCIA facility is within one mile of the Museum of Flight, which provides competing meeting and special event facilities. As described in Chapter III, the Museum is considering expansion; although the scope of the expansion is not known at this time, it is likely to reduce the demand available to fill the KCIA conference center. The Museum is an established operation with a significant amenity and attraction due to its exhibits.

## **POTENTIAL CAPTURE OF TRADE AREA DEMAND**

As mentioned earlier, due to its location and physical characteristics, the KCIA conference center is not likely to be competitive in the national or international convention market. However, the facility can potentially capture market demand generated by establishments and social groups located in the immediate area and in King County as a whole. Specifically, EPS has identified the following two demand segments as most relevant to the KCIA facility:

- **Local KCIA Submarket Demand:** The KCIA conference center is likely to be highly competitive with respect to businesses and other establishments located in the immediate area, or local submarket, as shown in **Figure III-1**. Currently there is only one other competitive facility, the Museum of Flight, located in this submarket.
- **King County Unmet Demand:** Currently a number of businesses or other establishment in King County are unable to find adequate space on the date needed. These events are either delayed, scheduled in unsatisfactory facilities, or moved to facilities outside the County. Based on interviews with meeting planners, facility operators, and local businesses and non-profits/associations, EPS estimates that about 5 percent of total demand in the County is unmet or in excess of current supply. The KCIA facility could potentially capture a portion of this excess demand.

A forecast of demand from the two market sources described above is presented in **Table IV-2**. The analysis assumes that the KCIA facility can capture approximately 50 percent of the total demand emanating from its local submarket area. The remainder of KCIA submarket generated demand will either go to the Museum of Flight or to facilities in other submarkets. The analysis also assumes that the KCIA facility can

**Table IV - 2**  
**Estimated KCIA Facility Demand: 1997 - 2010**  
**KCIA Conference Center Feasibility Study**

Source of Demand	Factor	Meeting Room Demand By Year		
		1997	2000	2010
<b>Total KCIA Submarket Demand</b>		1,696	1,750	2,062
Submarket Demand Captured By KCIA	50%	848	875	1,031
<b>Rest of King County Demand</b>		6,312	6,631	7,734
County Demand Unmet by Current Facilities (1)	5%	316	332	387
Unmet Demand Captured by KSIA	50%	158	166	193
<b>Total KCIA Demand from Submarket and County (2)</b>		<b>1,006</b>	<b>1,041</b>	<b>1,224</b>

(1) Based on EPS interviews, it is assumed that approximately 5% County meeting demand is either delayed, relocated outside the county, or unmet due to insufficient facilities.

(2) Does not include demand from social functions or government offices.

Source: Economic & Planning Systems, Inc.



capture approximately 50 percent of the overflow or excess demand that currently exists in the remainder of the County. The remaining 50 percent of this excess demand will continue to flow to facilities outside the County or be captured by facilities under-construction or in the supply pipeline.

Based on the above assumptions, the KCIA facility can capture approximately 1,000 meeting day events per year in 1997 and 1,220 meeting day events by 2010, as shown in **Table IV-2**. The bulk of this demand, or approximately 85 percent, is generated by establishments located in the KCIA submarket, with the remainder coming from the rest of King County. It is important to note that this demand forecast does not include meetings or events generated by social groups or activities such as auctions. This component of KCIA demand is estimated separately in **Chapter V**.

## V. FINANCIAL EVALUATION

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The market research described in the prior sections of this report indicates that demand exists for high quality, reasonably priced conference facilities. A pro forma analysis was prepared to evaluate whether the potential demand would be sufficient to support the operation of a facility, and provide net income to fund major capital improvements required to upgrade the existing facility. The pro forma is preliminary and intended to provide a general indicator of feasibility; more detailed facility planning and assessment of annualized projections will be necessary to develop a more precise analysis.

The key assumptions of the financial analysis are based on the market evaluation, review of industry averages, and consideration of the features of a KCIA facility. Key assumptions, which are documented in greater detail in the notes to **Table V-1** include the following:

- Approximately 1,040 meetings are assumed per year. Each meeting would occupy 500 to 1,000 square feet of space.
- The analysis assumes average rent of \$400 per meeting. The use of the banquet hall by some of the meeting participants will generate additional income, but this is assumed offset by meetings that occupy smaller spaces and/or run for half a day. Additional income is assumed from conference related services. It is assumed the facility will charge market rates reflecting its location and predominantly local market, which will be lower than rates, for example, for conference facilities in downtown Seattle.
- At least two social or other events (auctions, etc.) are assumed per week, with an average rent of \$1,000 each plus food and beverage income.
- The restaurant is assumed to be open to the public, as well as provide support facilities for the conference operation.

Full-time management and support staff are assumed, as well as an ongoing marketing effort. A conference coordinator will be required, as well as setup, maintenance staff and catering staff. To be competitive, it is assumed that a high level of service must be provided.

The results could vary significantly due to a number of factors:

- The region is projected to experience continued growth, increasing employment by about 20 percent by the year 2010 and consequently increasing the amount of meeting space demand. However, an economic downturn or slowing of growth would adversely affect the projections.

**Table V-1**  
**Summary of Financial Pro Forma**  
**KCIA Conference Center Feasibility Study**

<b>Item</b>	<b>notes</b>	<b>Amount</b>
<b><u>Revenues</u></b>		
Conference Services	(1)	\$907,008
Food and Beverage		
Conferences	(2)	1,586,580
Public	(3)	<u>1,000,000</u>
<b>Total Revenues</b>		<b>\$3,493,588</b>
<b><u>Expenses</u></b>		
Conference Services	(4)	\$453,504
Food and Beverage	(5)	1,810,606
Administrative & General	(6)	250,000
Energy	(7)	174,679
Property Operation & Maintenance	(8)	<u>250,000</u>
<b>Total Expenses before Fixed Charges</b>		<b>\$2,938,789</b>
<b><u>Fixed Charges</u></b>		
Management Fees	(9)	\$250,000
Property Taxes	(10)	35,000
Insurance on Building and Contents	(11)	<u>20,000</u>
<b>Total Fixed Charges</b>		<b>\$305,000</b>
<b>Income Before Other Fixed Charges*</b>		<b>\$249,798</b>

\* Does not include items such as depreciation, rent, interest, amortization, and income taxes.

Source: Economic and Planning Systems, Inc.

## Notes to Table V-1:

(1) Meeting Room Rental	29% annual average occupancy 10 meeting rooms 1,046 meeting room-days \$400 per meeting room-day \$418,290 total
Banquet Room Rental	100 annual events \$1,000 avg. rental rate \$100,000 total
Other Conference Revenues Includes audio visual rentals and sales, service fees, setup charges, etc.	75% of room rental income \$388,718
(2) Conference food and beverage	40 attendees (avg.) per meeting room-day 1,046 meeting room-days 41,829 annual attendees \$20 per attendee \$836,580 total  100 annual banquet room events 50% of banquet room events are catered 250 attendees per banquet event 12,500 banquet attendees \$60 per attendee \$750,000 total
(3) Restaurant Revenues	4,000 sq.ft. \$250 per sq.ft. \$1,000,000 total \$2,740 per day
(4) Conference Service Expenditures including coordinator, staff for setup, equipment leases, costs of goods sold	50% of conference revenues \$350,000 minimum
(5) Food and Beverage Expenditures	70% of food and beverage revenues \$850,000 minimum
(6) Administrative & General	7% of total revenues \$250,000 minimum
(7) Energy	5% of total revenues \$150,000 minimum
(8) Property Operation & Maintenance	7% of total revenues \$250,000 minimum
(9) Management Fees	7% of total revenues \$250,000 minimum
(10) Property Taxes	1% of total revenues \$35,000 minimum
(11) Insurance on Building and Contents	\$20,000

- This analysis has identified increases in competitive supply due to expansions of existing facilities, and new facilities. The exact extent and timing of many of these developments is unknown, and new facilities may be proposed that have not been anticipated. A significant increase in competitive supply in the immediate vicinity, e.g., expansion of the Aviation Museum, could reduce demand for the KCIA facilities.
- The results assume that adequate parking is provided, and a high level of construction and improvements. A lack of adequate heating and ventilation, soundproofing, obstructed sight lines, and insufficient parking would deter potential users.

## **PRO FORMA ANALYSIS**

Table V-1 summarizes the results of the pro forma analysis, which shows a positive annual income in a stabilized year of \$250,000. Initial years are likely to be lower until the facility gains recognition and market share. The positive result does not include any deductions for rent, replacement or operating reserves, or debt service. It will be necessary for the facility to invest in a significant level of upgrade and improvements to achieve the results shown. Table V-1 indicates an ability to support approximately \$2.0 million dollars of debt; actual costs, including design, architecture and engineering, are not known at this time, but may approach or exceed the amount of supportable debt, depending on the size of the facility and extent of required improvements.

The facility could cover its operating costs with a minimum of 730 meetings per year. This level of operations assumes that certain operating, management and overhead costs are fixed at a minimum level. No significant amount of revenue would remain to recoup initial years' shortfalls or to fund capital costs.

## APPENDIX A: COMPETITIVE FACILITIES

## **APPENDIX A: COMPETITIVE FACILITIES**

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The following sections describe key facilities in the Seattle region that will compete for a portion of KCIA Conference Center's clientele. For most of the conference facilities and a few convention, other facilities, or hotels, the number of meeting rooms and ballrooms, and their respective square feet and capacity were obtained or estimated. Additional tabular data is included in **Chapter III** and **Appendix B**.

### **CONFERENCE FACILITIES**

#### **SOUTH KING COUNTY**

**Museum of Flight.** The Museum of Flight is located on the southwest corner of King County International Airport and will be the predominant competitor of the proposed conference facility at KCIA because of their proximity to each other. According to the Museum of Flight, business is currently very strong. The facility had approximately 100 percent increase in the number of functions in the last year (1997). Within the next three to five years, the Museum of Flight plans to expand and envisions becoming "the largest special events facility on the West Coast," with a capacity from 5,000 to 6,000 people for receptions. The Museum of Flight is a non-profit facility that contains four meeting rooms and one ballroom. The meeting rooms total 10,200 square feet for 260 people in a conference setting, and the ballroom is 78,000 square feet with capacity for 2,500 people in theater style seating. The facility hosts 500 events a year, of which approximately 80 percent are local businesses who conduct meetings and conferences. The average number of people per event for the local businesses is 150. The other 20 percent are national and international businesses that host social events, and the average attendance for these events is 1,000 people per event.

Advantages of the facility include access to the Museum, 800 free parking spaces, a variety of meeting spaces, and proximity to the Boeing Field to fly out to events.

**Dumas Bay Centre.** Dumas Bay Centre is located in Federal Way, approximately 19 miles from KCIA. The Centre contains five meeting rooms and has a capacity of 235 people in a conference setting. It also contains 70 beds and a passive park. The facility is primarily used by local businesses and residents for conferences, meetings, retreats, and banquets.

#### **SEATTLE**

**Bell Harbor International Conference Center.** The Bell Harbor International Conference is located in downtown. The center contains eleven meeting rooms with a capacity of 470 in a conference setting, as well as a 4,000 square foot ballroom and a 4,200 square foot exhibit hall. Out of the total clientele, 68 percent is local, 20 percent is international, 8 percent is national, and 5 percent is regional. About 70 percent of the

users are corporate businesses that use the center for management meetings, product launches, sales, and strategic planning. The remaining 30 percent are from social groups who hold auctions and pre-function activities. The facility has approximately 360 meetings during the year, with an average attendance of 50 per event. The ballroom is used 75 percent of the time during the weekends for social events. For meeting events, the busiest seasons are from March through June and December. For social events, the busiest months are July, August, and December. Sundays and holidays are usually not booked. The center has partnerships with nearby hotels, including free shuttling and hotel discount room rates for attendees who need to stay overnight in the vicinity. Moreover, a Marriott Hotel will be built across the conference center in about three years. The facility does not plan to expand in the next five to ten years.

Advantages of the center include rooms with water views, quiet setting on the waterfront, natural lighting, and ergonomic furniture in all rooms.

**Port Ludlow Resort and Conference Center.** Port Ludlow Resort and Conference Center is a condominium resort center located in Seattle. The center consists of six meeting rooms for 135 people in a conference setting. It also contains a ballroom for 210 people in a theater setting, 400 seat auditorium, and 140 guestrooms. Types of use for the conference center include social gatherings and executive planning sessions. The summer season is busy with weddings and receptions, while November and December are the slowest months

**Seattle International Trade Center.** The building is currently being purchased, thus the center is reserving spaces only until November 1998. After November, the conference and banquet rooms will be converted to office space. During the weekends, the facility is used 35 times out the 52 weekends, mainly for regional tradeshows that last from two to three days. The ballroom space is used mostly during the spring, summer months, and holiday seasons. Approximately 80 percent of the center's business are from local associations that use it for tradeshows, conferences, and banquets typically for 500 people per event. The other 20 percent of the users are local corporations using it for tradeshows and banquets for about 600 people per event. The months of July through August are easier to reserve spaces because people go on vacations during those months.

According to representative of the Seattle International Trade Center, advantages of this facility include the following items: 1) a venue for small to mid-size shows to local customers; 2) plenty of parking; 3) on waterfront property; and 4) not tied to hotel rooms.

**The Mountaineers Building.** The facility is owned by the Mountaineers, a company that provides outdoor activities training. The facility contains five meeting rooms with a total capacity of 500 people in a conference setting, in addition to a 2,900-square foot ballroom for 290 people in a theater setting. About 50 percent of the time, the Mountaineers use its meeting facilities for training. The other 50 percent are used by local groups for social events. Total costs for room rental and lunch is \$1,213 for 75 people.



**Yale Street Landing.** Yale Street Landing a conference and reception facility with two meeting/reception rooms. The first room is 1,850 square feet and the second is 900 square feet. Approximately 50 percent of the clientele are local businesses for conferences, banquets, and meetings who typically use the facility all day. The other half are from out-of-state, usually businesses that are hosting meetings. Hotels are adjacent to the facility including Marriott by Courtyard and Silver Cloud Inn.

#### BELLEVUE/EAST SIDE

**Meydenbauer Convention Center.** The Meydenbauer Convention Center is located in downtown Bellevue, approximately 14 miles from King County International Airport. The facility contains four divisible meeting rooms that total 12,000 square feet for 700 people in a conference setting. A 410-seat theater and a 36,000-square foot-exhibit hall are also within the facility. The Meydenbauer Center hosts an average of 350 events annually, primarily from August to December. An average of 1,400 people attend each event for corporate meetings, conventions auctions, and trade shows. The attendees are mostly regional businesses who stay from two hours to five days, depending on the type of event.

**Overlake Hospital Conference Center.** Overlake Hospital Conference Center is located in Bellevue. It is primarily used by the adjacent hospital for staff meetings. The vicinity is comprised of one auditorium for 156 people and 4 conference rooms that fit between 20 to 50 people

**St. Thomas Conference Facility.** The St. Thomas Conference Facility, located in Bothell, about 25 miles from King County International Airport, is leased for 10 years by Vastyr University, a national health science university. During the weekdays, the rooms are used for classes. However, the rooms are available to the public during the weekends, primarily to local non-profit organizations, such as religious groups, 50 percent; educational groups, 25 percent; and social non-profits, 25 percent. Approximately 90 percent of the weekends are booked, except holidays. Out of the number of people attending the weekend events, the average number of persons staying overnight is 35 and approximately 40 persons stay for day meetings. Besides classroom rentals, the facility also has 40 sleeping rooms with 79 beds.

**Loma Center for Renewal.** Loma Center for Renewal is located in Issaquah, about 18 miles from KCLIA. The facility contains 12,000 square feet of meeting space and has a capacity of 400 people in a conference setting. It also contains 50 sleeping rooms.

**The Effectiveness Institute Conference Center.** The Effectiveness Institute Conference Center is located in Redmond, about 17 miles from the King County International Airport. It is privately owned by Effectiveness Institute, a leadership training company. The center contains three meeting rooms, with a total conference setting capacity of 50 people. The center's clientele is 90 percent local businesses, and 10 percent regional businesses. These businesses use the facility for training for a day or up to a week. The

fall season and the months of January and February are the busiest times. The facility does not plan to expand in the next five to ten years, but the Center does turn away about four business groups a year.

**Bellevue Conference Center.** The Bellevue Conference is located in Bellevue. The Center closed January 21, 1998 due to disputes among the owners. The owners, however, may be looking at other locations for a conference center. The facility consists of five meeting rooms with a capacity of 450 people classroom style and contains two ballroom spaces for 700 people theater style.

## **OTHER AREAS**

**Seabeck Conference Center.** Seabeck Conference Center is located in Seabeck, about 34 miles from KCIA. Seabeck is located outside the market area of the KCIA Conference, however, it is important to note this facility since it serves the northeast region just outside of King County. It consists of 12 meeting rooms for 240 people in a conference setting. Moreover, the center is on 90 acres and contains 250 beds. The Center is a non-profit facility for churches and family groups. The average number of people at an event is 50. In 1997, the center hosted 189 conferences for 10,000 attendees. About 80 percent of the attendees are from the Western Washington area, while the remaining 20 percent are national. The months from May through September are busy.

## **OTHER FACILITIES**

Approximately 18 other facilities that provide meeting and conference spaces are located in the Seattle region. However, these uses are not primary competition. As shown in Table III-3, they include community colleges and centers, universities, halls, and institutions that rent their spaces when they are not used for their primary functions (e.g., classes).

## **HOTELS WITH MEETING ROOMS**

As shown in Table III-4 and Figure II-2, the King County region includes an estimated 66 hotels with 375 meeting rooms and 18 ballrooms. The table lists the number of hotels, and estimates of the meeting and ballroom square feet and capacity by region. For additional information on a selected number of hotels with meeting spaces, see Appendix B.

APPENDIX B:  
SELECTED HOTELS WITH MEETING SPACES

**Appendix B**  
**Selected Hotels with Meeting Spaces**  
**KCIA Conference Center Feasibility Study**

Facility	City	Meeting Rooms			Ballrooms			Notes	Primary Users	User Type
		#	Sqft	Capacity (1)	#	Sqft	Capacity (2)			
Bellevue/East Side										
Bellevue Club Hotel	Bellevue	n/a	n/a	n/a	n/a	n/a	n/a	n/a		n/a
Bellevue Hilton Hotel	Bellevue	n/a	6,750	225	n/a	2,500	250	n/a	n/a	n/a
Best Western Bellevue Inn	Bellevue	n/a	16,770	559	n/a	4,990	499	In-house catering only	n/a	n/a
Doubletree Bellevue Center Hotel	Bellevue	n/a	5,100	170	n/a	2,000	200	In-house catering only, 208 guest rooms	n/a	n/a
Doubletree Hotel Bellevue	Bellevue	10	17,355	1,200	1	9,652	1,200	35,000 sqft exhibit hall, 353 guest rooms	n/a	n/a
Embassy Suites Hotel	Bellevue	n/a	8,000	150	n/a	2,000	200	In-house catering only	n/a	n/a
Hyatt Regency Bellevue	Bellevue	9	4,950	700	2	7,940	1,015	4,500 sqft Atrium	n/a	n/a
West Coast Bellevue Hotel	Bellevue	5	2,525	108	1	3,276	320	In-house catering only	n/a	n/a
Subtotal		24	61,450	3,112	4	32,358	3,684			
South King County										
Hawthorne Suites	Kent	n/a	1,896	130	n/a	n/a	n/a	n/a		
Holiday Inn Hotel & Suites-Kent	Kent	n/a	3,000	100	n/a	n/a	n/a	n/a		
Holiday Inn Select-Renton	Renton	n/a	6,500	217	n/a	n/a	n/a	n/a		
Comfort Inn at Sea-Tac	Sea-Tac	n/a	n/a	n/a	n/a	n/a	n/a	n/a		
Doubletree Hotel Seattle Airport	Sea-Tac	17	12,024	401	2	19,850	1,985	850 guest rooms, business service center	Corporate, associations, education	Regional/national
Quality Inn Sea-Tac	Sea-Tac	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Seattle Marriott Sea-Tac Airport	Sea-Tac	12	5,100	170	4	7,792-5,040	150/450B	459 guest rooms, 20,000 sqft Atrium	corporate for training	Local
Subtotal		29	28,520	1,017						
Seattle										
Cavanaugh's on Fifth Avenue	Seattle	5	12,000	400	1	8,915	630	300 guest rooms		
Doubletree Suites	Seattle	11	0	600	2	8,696	870	419 guest rooms		
Park Plaza Suites	Seattle	3	0	60	n/a	n/a	n/a	193 guest rooms		
Sheraton Seattle Hotel	Seattle	18	17,385	543	2	18,732	2,000	840 guest rooms	corporate business, national association	Local/regional
The Claremont Hotel	Seattle	1	550	7	2	4,450	200	120 guest rooms	n/a	n/a
The Westin Seattle	Seattle	17	14,895	462	2	22,905	2,670	865 guest rooms	corporate-national meetings	National/International
University Inn	Seattle	2	1,200	16	0	0	0	102 guest rooms	n/a	n/a
University Plaza Hotel	Seattle	n/a	22,500	300	n/a	n/a	n/a	135 guest rooms	n/a	n/a
West Coast Roosevelt Hotel	Seattle	2	n/a	n/a	n/a	n/a	n/a	151 guest rooms	n/a	n/a
Subtotal		59	68,530	2,388	9	63,698	6,370			
Total		112	158,500	6,518	13	96,056	10,054			

(1) Conference 30 sqft/person unless the data is already provided.

(2) Theater 10 sqft/person unless the data is already provided.

Sources: Respective facilities; Seattle, Washington Meeting Planners Guide; East King County Convention and Visitors Bureau; Economic & Planning Systems, Inc.

APPENDIX C:  
LIST OF PERSONS CONTACTED

## **APPENDIX C: INDIVIDUALS CONTACTED**

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Stephanie Benjamin, Sales Coordinator, Convention Services Northwest

Terry Carrow, Strategic Site Specialist, Meeting Sites Resource

Andrea Chenadi, Convention Hosts of Seattle

Teiry Furman, President, Group Planning Specialists, Inc.

Richard Gartrell, President, East King County Convention Visitors Bureau

Danica Goldie, Administrative Assistant, Avid Events, Inc.

Brigid Graham, Marketing Director, Kip Toner Benefit Auctions

Margaret Perugini, President, Any Mirkovish Productions, Inc.

Lisa Sinner, Confidential Secretary, King County International Airport

Catherine Springman, Columbia Resource Group (CRG)

Darci Russell, Director of Sales, Seattle VIP Services

Anais Winante, Vice President of Public Affairs, Seattle Visitors & Convention Bureau



## APPENDIX D: BIBLIOGRAPHY

## APPENDIX D: BIBLIOGRAPHY

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